



INTRODUCTION

1.1 Statement of Need

The State of California, its cities and counties, and the Department of Defense (DoD) have a long and successful history of working together to build a stronger California and a more secure nation. California has more military installations and operational areas than any other state in the nation. The state's varied climate, terrain, and coastline provide unique training and testing opportunities for the Army, Marine Corps, Navy, and Air Force. The state's aeronautical and technological heritage also contributes to the

The term "land use compatibility", in relationship to military readiness, can be defined as the balance and/or compromise between community and military needs and interests. Finding this balance promotes an environment where both entities can coexist successfully.

benefits the military receives by locating facilities in California. In return, the benefits to the state are significant. In 2005, California had over 278,000 persons directly employed by the military (active duty, civilian, Reserves, and

National Guard), and military expenditures topping \$42 billion.

However, in addition to the many positive interactions between local communities and military installations, the activities or actions of one entity can negatively impact the other and create conflicts. As

communities develop and expand in response to growth and market demands,

referred to as encroachment, can have negative impacts on community safety, economic development, and sustainment of military activities and readiness. This threat to military readiness activities is currently one of the military's greatest concerns.

The protection of installations and operation areas is vital to the State of California and to overall military readiness.

In the past, incompatible development has been a factor in curtailing training operations, moving (realigning) mission-critical components to other installations, and, in extreme cases, closing installations. Similarly, the impact of military installations on local communities can result in safety issues and environmental degradation. Compatibility between military installations and local communities is essential to protect military missions, the health of local economies and industries, and the quality of life for residents. In order to achieve compatibility, the military and local governments must be collaborative and cooperative.

Once isolated from each other, military areas and communities are now in closer proximity because of a rapidly growing population and expansion of urban boundaries. Over the next 45 years, the

"... the encroachment on our ability to train adequately in an era when training increasingly represents the most important qualitative edge that the US military enjoys, threatens a collision that will endanger the lives of our servicemen and women."

- Former Deputy Secretary of Defense
Paul Wolfowitz

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state is projected to grow by over 50 percent, with a projected 2050 population of 54.8 million residents. This growth presents a wide range of planning challenges for local communities, as well as for military installations and operation areas that call California home.

Maintaining the character of California communities and optimizing military assets and operational areas creates immense benefits for the state and the military. Capitalizing on this interdependence through collaboration that promotes compatible land use planning strengthens the ability of the military to fulfill its operational mission and for local communities to provide the quality of life long valued by California residents.

1.2 Handbook Purpose and Objectives

The Governor's Office of Planning and Research (OPR) collaborated with local, state, and federal stakeholders to develop and produce this Advisory Planning Handbook (Handbook) in compliance with SB 1468 (Knight, Chapter 971, Statutes of 2002). The Handbook's primary purpose is to provide guidance to cities, counties, property owners, developers, and military personnel on how best to encourage collaboration. The Handbook will also provide a menu of tools and strategies that help maintain compatibility between community land uses and military activities. To accomplish this, the Handbook presents available planning tools, best practices, and processes. This information will

Government Code 65040.9 required OPR to prepare "an advisory planning handbook for use by local officials, planners, and builders that explains how to reduce land use conflicts between the effects of civilian development and military readiness activities..."

allow local planners, builders, and the military to share information and communicate in a timely and proactive way so that all parties can make fully informed land use decisions. The Handbook also provides advice to cities and counties as they revise and update their general plans.

The following issues are vital to the determination of best practices and land use processes.

This Handbook is an advisory document. Its goal is to provide information on how communities and the military can collaborate to reduce land use conflicts.

Defining the Issues

Land use compatibility is achieved when communities and military installations balance complementary and competing needs and interests. The factors that determine compatibility range from man-made activities (land use, infrastructure, noise, dust, light, and glare) to natural resources (water quality, biological habitats) to the competition for scarce resources (land space, airspace, and sea space). To identify which tools and strategies may work for a given community or installation, compatibility factors applicable to the area must be identified (see Section 2). Understanding the issues and factors that foster land use compatibility will be crucial to identifying the proper tools and strategies for each community.

The unique and varied planning processes used by state, local, and federal entities must also be factored into the collaborative process that is promoted within this Handbook (see Section 3). The ability of local, state, and federal governments to conduct their own planning processes provides flexibility and empowerment for self-governance. However, the documents and plans produced by one jurisdiction can often be oriented towards specific needs and are not coordinated or enforceable over the actions of another entity. In addition, several programs, such as the military's Air Installation Compatible

Use Zone (AICUZ) program, rely on voluntary adoption by local governments.

Although planning processes are separately established, there are opportunities for collaboration which are identified by this Handbook. This Handbook provides a flexible planning toolbox that can be applied in a variety of ways to meet the unique needs of each stakeholder involved in promoting community and military compatibility planning.

Local Planning Needs

Local governments use planning processes to shape and guide growth and development. To capture the future envisioned by its residents, local governments often must balance competing interests and make difficult trade-offs. Recognition of local planning needs and their relationship to military operations is critical to designing collaborative and comprehensive planning processes to avoid incompatible land uses.

Military Planning Needs

The fundamental purpose of military installations in California is to support military readiness, including the testing and training needs of the United States Armed Forces. Military installations must have access to air, land, and sea space, as well as other support items, such as an interference free frequency spectrum, in order to conduct training missions and perform testing. Local governments must recognize the needs of military installations and operation areas to determine what planning tools local communities should use to promote compatibility.

and a non-voting liaison from each branch of the United States Armed Forces, council duties include: 1) identification of major installations in California; 2) determination of how best to defend existing bases and base employment in the state; 3) coordination with communities that may face base closures; 4) development of data and analysis on bases in the state; 5) coordination with the congressional delegation; and 6) preparation of a study considering the long-term protection of lands adjacent to military bases. Findings from this study, performed in 2001 by the University of California, Berkeley, Institute of Urban and Regional Development, noted that more than half of California's military installations are located within, or at the boundary of, major metropolitan areas. Further, impacts from the incompatibility of land uses were also found to include the effect of military installations on nearby residents and environmental issues that arise when endangered species migrate from developing areas to military installations.

In 2002, the California Legislature responded to these findings, passing SB 1468 (Knight, Chapter 971, Statutes of 2002) and AB 1108 (Pavley, Chapter 638, Statutes of 2002). SB 1468, requires cities and counties to consider the impact of growth on military readiness activities when preparing or updating their general plan for lands adjacent to military facilities or underlying designated military aviation routes and airspace. The act encourages cooperation between military installations and local communities when developing strategies to address growth. In addition to requiring OPR to develop an advisory handbook, SB 1468 also directs OPR to include information in its **General Plan Guidelines** on how to reduce land use conflicts between civilian development and military readiness activities.

AB 1108, passed in 2002, amends the California Environmental Quality Act (CEQA) to ensure military agencies are provided notice of proposed projects within two miles of installations or underlying training routes and Special Use Airspace (SUA). To obtain this notification, military installations must provide the local

1.3 Regulatory Framework

In 1999, SB 1099 (Knight, Chapter 425, Statutes of 1999) established the California Defense Retention and Conversion Council, effective until January 1, 2007. Comprising all major executive branch agencies of the state, public appointees,

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planning agencies in their area of the installation's contact person and the relevant information and boundaries of the installation's low-level flight path, military impact zones, or SUA. The local lead agency is required to give notice to the military installation of any project within those boundaries if: (1) the project includes a general plan amendment; (2) the project is of statewide, regional, or area wide significance; or (3) the project is required to be referred to the airport land use commission or appropriately designated body (Public Resources Code 21098). This notification will provide the military with an opportunity to provide early input, so that potential conflicts can be evaluated and addressed proactively.

SB 1462 (Kuehl, Chapter 907, Statutes of 2004) expanded the requirements for local government to notify military installations of proposed development and planning activities. This bill states that before a legislative body adopts or substantially amends a general plan, the planning agency shall refer the proposed action to the designated point of contact at each of the branches of the military when the proposed project is located: (1) within 1,000 feet of a military installation, (2) beneath a low-level flight path, or (3) within special use airspace (SUA) (Government Code 65352(a)(6)).

The bill also requires local jurisdictions to revise their application checklists to require the applicant to identify when a proposed project is located within one of the three areas identified above (Government Code 65940(b)). In turn, the local jurisdiction is required to provide a copy of the completed application to affected branches of the United States Armed Forces (Government Code 65944(d)).

The military provided OPR with electronic maps of SUAs, low-level flight paths, and military installations to assist local governments in complying with SB 1462. As required, OPR has notified cities and counties of the availability of the information on the Internet. This mapping information can be found online in the form of the

California Digital Conservation Atlas, which can be accessed at:

<http://atlas.resources.ca.gov/>

In addition, the State has provided an online mapping system that can be used by applicants and agencies to determine whether specific development applications meet the criteria for referral to the military. The California Military Land Use Compatibility Analyst (CMLUCA) can be found at:

<http://sample1.casil.ucdavis.edu/Calmap8/index.html>

Information on accessing and using the California Digital Conservation Atlas and CMLUCA can be found in Appendix A. Additional information on the legislation identified in this section can be found in Appendix E.

1.4 Public Outreach

Extensive public outreach was conducted during the development of this Handbook. The outreach program engaged and received input from various stakeholders, including, but not limited to, representatives from military installations, the business community, environmental groups, community planners, and the general public. The following outreach tools were used in developing the Handbook.

- **Handbook Advisory Committee.** An Advisory Committee composed of local planners, military representatives, and other stakeholders served in an oversight role throughout the development of the Handbook. This committee was tasked with assisting OPR in the production of an easy-to-use Handbook that would assist planners, agency representatives, landowners, and the public in addressing land use compatibility issues. The Committee members took an active role in reaching out to their peers to obtain input on the development of the Handbook.

- **Public Scoping Workshops.** Three Public Scoping Workshops were held in various geographic regions of the state. These workshops were designed to identify issues pertaining to land use incompatibility and to determine collaborative planning policies and practices currently used throughout the State. Locations for these Public Scoping Workshops were as follows:
 - Lancaster - September 7, 2005
 - San Diego - September 9, 2005
 - Sacramento - September 12, 2005
- **Focus Group Meetings.** In conjunction with the Public Scoping Workshops, three Focus Group Meetings were held at the same locations. These Focus Group sessions provided a platform for the State and the consultant team to identify issues, solicit suggestions, and receive input from participants based on areas of interest and expertise, including local planners, state and federal agencies and departments, military officials and base planners, and private and community stakeholders.
- **Public Hearings.** Three public hearings were held to present the Draft Handbook and receive public comment. Locations for these hearings were as follows:
 - Bakersfield - December 12, 2005
 - Sacramento - December 14, 2005
 - San Diego - December 15, 2005
- **Database.** A database identifying stakeholders was developed and continuously updated throughout the planning process. This database served as one of the primary avenues for distributing information on the development of the Handbook and key outreach and public input opportunities.
- **Web Site.** During development of the Handbook, a Handbook Web site was maintained. The Web site served as a central location for stakeholders and the

general public to learn about the development of the Handbook; find a schedule of events, including meeting and hearing locations; locate documents and meeting minutes; and determine the points of contact for further information.

- **Media Advisories.** To ensure a consistent message, a media guide was created providing basic information, including the purpose of the Handbook, the Project Fact Sheet, a timeline of key events, and points of contact. Separate versions of the media guide were prepared for the regional scoping workshops and public hearings. In addition to the media guide, media advisories preceded each event.

1.5 Handbook Organization

One of OPR's primary objectives for the Handbook was to make the document user-friendly. To do this, the Handbook has been organized into the following sections for quick and easy reference.

Section 1 - Introduction. This section of the Handbook is designed to provide background on the purpose and intent of the Handbook and a general overview and guide to the Handbook.

Section 2 – Compatibility Factors. One of the primary objectives of this Handbook is to provide guidance and planning tools to assist planners – local, federal, and private – in working together to ensure land use compatibility and community economic stability. This section provides a broad definition of land use compatibility and a more detailed look at individual compatibility factors. In order to identify which tools and strategies will work for a given community or installation, jurisdictions must be able to identify the compatibility factors relevant to their planning area.

Section 3 – Planning Process and Implementation. When implementing planning tools and strategies that address sustainability, land use compatibility, and related issues, it is

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important to have a common understanding of the community and military planning processes that shape future land use. This section provides a general discussion of local and military planning processes and the role of federal and state regulators in these planning decisions. It will also provide a discussion of the collaborative planning process and how local and military planners can work together to ensure land use compatibility.

Section 4 - Implementation Strategies. This section provides a guide to a range of planning tools that may be used to address land use compatibility and sustainability issues. This section identifies these planning tools and discusses the definition, purpose, key issues, roles and responsibilities, implementation and maintenance, resources and reference, and, where appropriate, case study and best practices examples.

Section 5 – Implementation Examples. This section provides a brief description of several successful collaborative planning efforts involving states, local governments, and the military. These examples come from around the nation and illustrate planning concepts and implementation strategies that further the goal of military and community land use compatibility.

Section 6 – Acronyms. This section provides a list of acronyms used in the Handbook or related to compatibility planning.

Section 7 – Glossary. Common planning terms for both local governments and military planning are identified in this section.

In addition to these sections, the Handbook contains several appendices that provide detailed information on specific aspects of compatibility planning.

- **Appendix A** – Military Installations in California
- **Appendix B** – General Plan Policy Examples
- **Appendix C** – State and Federal Technical Assistance
- **Appendix D** – Land Use Compatibility Examples
- **Appendix E** – Overview of State Legislation
- **Appendix F** – Advisory Handbook Outreach Plan